SMART DATA SOLUTIONS VIRTUAL MAILBOX

Abstract This manual will assist with online submissions of documents typically sent via mail.

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Abstract

Smart Data Solutions, Inc. ("SDS"), an independent company, has designed a web-based submission method to allow providers to electronically submit documents (e.g. claims, adjustment requests, etc.) traditionally sent via the mail.

Registration

Users will need to register an account within the portal to submit files. The following URL is used to access the enrollment form: <u>https://quickclaim.smart-data-</u> solutions.com/quickclaim/servlet/quickclaim/template/ClearingHouse%2COpenEnrollment.vm/ cc/CHUMSUB

For your convenience, only one main account is needed per office/department. The registrant who enters their contact information is the designated administrator and responsible for creating sub-accounts for additional users.

Enter the following information on the enrollment form:

- Provider Name Enter the Name of the Provider or Facility
- Provider TIN (Tax ID)
- Provider NPI
- Contact Name Enter the Name of the Registrant/Admin for Portal Acct
- Contact Phone
- Contact Email
- Password

Once you select "Submit" on your enrollment form, you will receive the following message:



Then, you will receive an email from Stream Enrollment with your user name and URL.



Accessing the Portal

The following URL is used to access the submission portal website:

Welcome to Qu	ickClaim!	
Username	10	
Password	lb.	SMARTDATA
Sign In	Forgot your password?	SOLUTIONS QuickClaim Control Panel
By logging	into QuickClaim, you are agreeing to comply <u>QuickClaim Er</u> QuickClaim	with the policies and restrictions outlined in the links below:
	Copyright © 2002-2024 Smart D	ata Solutions, Inc. All rights reserved.
	CPT © 2024 American Medic	al Association. All rights reserved.

https://quickclaim.smart-data-solutions.com/quickclaim/servlet/quickclaim/

Note: SDS implemented an MFA (Multi-Factor Authentication) requirement as of January 7, 2025. As of then, users have a 30-day grace period to enroll in MFA beginning from the first day they log in to the SDS Portal, after which time their account will be disabled.

To enroll in MFA, you may choose to do one of the following:

- 1. Download and utilize an Authenticator App (e.g., Google Authenticator, Microsoft Authenticator) on your personal device to generate a code/token to use at log in.
- 2. Have a temporary code/token sent to your e-mail to use at log in.

Multi-Factor Authentication Enrollment	Multi-Factor Authentication Enrollment									
You are required to enroll for Multi-Factor Authentication (MFA) by 2025-01-07. If you d	lo not enroll in MFA by the deadline, your account will be disabled.									
Vulti-factor authentication (MFA) is a critical security measure and industry best practice that requires users to provide two or more verification factors to gain access to a resource such as an application or online account. It is necessary for security since it adds another layer of defense, making it more difficult for unauthorized persons to access your account.										
Option 1: Generate codes using an authenticator app Preformed	Option 2: Send a code to my email									
With app-based MFA, an app on your personal device, such as Google Authenticator, generates random codes that are valid only for a short period of time, usually 30 seconds. An app-based MFA is more secure than email-based tokens, since it does not rely on a third-party service that can be compromised or delayed.	With email-based MFA, you will be emailed a temporary code that you can use to log in.									
Set up App-based MFA	Set up Email-based MFA									

Once enrolled in MFA, you will be prompted to enter your username and password on the initial login screen and the authentication token on a subsequent screen.

Upon login, users will see the Smart Data Stream Clearinghouse Portal.

		SIMARID	AIAS	IKEAM				
	lp							
Utilization	Managemen	t Submission			Virtual Mailb	ox		
🖶 Key New Uti	lization Manage	ement Submission		🐈 Upload				
Process	Age	Actions		Process	Age	Actions		
Aged Submissions	00:00:00:00	View Aged Submissions		Aged Submissions	00:00:00:00	<u>View Aged Submissions</u>		

The home page contains the following:

Navigation Ribbon

	SMARTDA	TASTRE	AM						
Home	Utilization Management Submission	Virtual Mailbox	Account Management	Help					

- Home returns user to the Smart Data Stream home page
- Utilization Management Submission see the UM Portal manual for additional details
- Virtual Mailbox submitting and tracking of documents uploaded to the Virtual Mailbox
- Account Management see the Account Management manual for additional details
- Help contains additional resources such as system support and FAQs
- Logout ends the session

Virtual Mailbox



- Upload New Virtual Mailbox Document this link will navigate to the online submission screen. See <u>Submitting Documents</u> for additional information.
- View Aged Submissions this link is used to view submissions uploaded to the Virtual Mailbox within the past 3 years. See <u>Submission Tracking – Aged Files</u> for additional information.

Virtual Mailbox Page

Select "Virtual Mailbox" from the Navigation Ribbon to redirect to the Virtual Mailbox page from anywhere on the portal:



The page contains the following:

- New Virtual Mailbox Submission this link will navigate to the online submission screen. See <u>Submitting Documents</u> for additional information.
- Older Virtual Mailbox Submissions this link is used to view submissions uploaded to the Virtual Mailbox within the past 3 years. See <u>Submission Tracking – Aged Files</u> for additional information.
- Displays document level details for submissions uploaded to the Virtual Mailbox within the selected "Timeframe." See <u>Submission Tracking Document Level</u> for additional information.

Submission Tracking - Document Level

This section will display information for submissions within the selected timeframe.

You can click on next to most of the column headings to sort the results in ascending or descending order based on the column criteria.

- Date Submitted date and time (Eastern/EST) of submission
- **PO Box** PO Box Destination selected by the user at time of submission
- **Clearinghouse Tracking Number** this is not currently used by the Health Plan
- **Payer Reference Number(s)** within 24 hours of submission this field will populate the tracking number assigned to the document(s); also referred to as DCN. This number(s) should be referenced when communicating with the Health Plan.
- File Name file name submitted through the Virtual Mailbox
- Status status of the file uploaded through the Virtual Mailbox
 - Submitted: Document has been submitted by provider, but not yet accepted for processing by Health Plan
 - Accepted: Document has been accepted for processing by Health Plan
 - Rejected: Document is unable to be processed due to issues with upload and has been rejected by Health Plan

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- Action this column will display links to additional options
 - Additional details regarding the submission, including the ability to see who submitted the document(s), an option to download the document(s) for ~3 months following submission, and displays the DCN (aka Payer Reference Number):

Claim Information	
Submitted By :	
Document :	
DCN :	

This is a notes function that allows the user to add reminders or other information for their *internal use only*. Anything entered in this screen will not be viewable by the Health Plan. When notes are present, the icon will turn green (¹)

File -	Edit - Vi	ew – F	ormat	Ŧ						
↑	Formats	- B	I	ΕΞ	3 8	I II -	≣ - ≣	⊡		
									POWERED BY T	INYM

This allows the user to view the image(s) of the uploaded document(s) for 90 days following submission

Filtering Results

The Search box in the upper right will default to only show items for the current day. Users can change/search to filter results by the following criteria:

Search using Claim ID Numbers	Q	Timeframe: Day -	Advanced Search 🗸
·			

- Claim ID Numbers filters results based on Payer Reference Number
- Timeframe options are Today, Day, Week, Month, Quarter
- Advanced Search allows for a specific date range search

×	Clear	
At lease Please • Rec • Rec	st one key field define at least ceived Date Fro ceived Date To	must be included in each search. one key field listed below: m
Dat	e	
Rece	eived Date From	1
Fro	om Date	
Rec	eived Date Fro	m is required
Rece	eived Date To	
То	Date	
Rec	eived Date To i	s required

Submitting Documents

Option 1 - To submit a new document(s), you may click on the "Upload New Virtual Mailbox Document" within the box labeled "Virtual Mailbox" on the home screen.

Virtual Mailbox Upload New Virtual Mailbox Document									
Process	Age	Actions							
Aged Submissions	00:00:00:00	<u>View Aged Submissions</u>							

Option 2 - To submit a new document(s), first select "Virtual Mailbox" from the Navigation Ribbon to go to the <u>Virtual Mailbox</u> page. Then, select "New Virtual Mailbox Submission".





Either Option 1 or Option 2 will redirect the user to the Virtual Mailbox submission screen:

Virtual Mail	box
Use this page to upload images of your clain submitted they will be virtually delivered to	ms and their attachments. You may include multiple claims and attachments in a single file as well as upload multiple files at a time. There is a size limit of 30 MBs per upload. Once the files have been the selected payer's PO Box.
	Select Payer Destination
	PO Box 21146 - Excellus
	Uplead Your File Here, (Navimum 30 MBg) Choose Files No File CHOSEN Acceptable file type: PDF, TIFF (Liff/Liff), PNG (.png), JPG (.jpg) and Word (.doc,.docx) only
	Submit

Users may upload multiple files at a time. Files must be less than 30MBs, not password protected and in one of the following formats: PDF (.pdf), TIFF (.tif/.tiff), PNG (.png), JPG (.jpg) or Word (.doc/.docx).

- **Destination** select the appropriate PO Box to electronically submit the document(s) to.
 - PO Box 21146 Excellus
 - PO Box 211256 Univera
 - PO Box 211316 Medicare Enrollment
- File Upload Box users may either click the "Choose Files" box to select a file(s) from their computer or drag and drop a file(s) into the box.

Note: If a file(s) larger than 30 MBs or not in one of the required formats [PDF (.pdf), TIFF (.tif/.tiff), PNG (.png), JPG (.jpg) or Word (.doc/.docx)] is selected, the following error message will display:

Error!	×
An error occurred while selecting your file. Please make sure it is one of the required file formats and is under 3 MBs.	0
	OK

When a file(s) has been attached, the file(s) name will show to the right of the "Choose Files" box.



To submit the file(s), click the "Submit" button under the file upload box. Once the file(s) has been submitted, the user will receive a message indicating the file(s) was submitted successfully. Users may upload additional files or select "I'm Done Submitting Files" to return to the <u>Virtual Mailbox</u> page.

PO Box 211256	
TC5 Inpat.pdf has been submitted successfully.	
	I'm Done Submitting Files

If the file(s) has previously been submitted, the user will receive a message indicating the file(s) has already been submitted. Duplicate file(s) will not be uploaded to the Health Plan.

PO Box 21146	
'UM - IP8.docx' has already been submitted.	
	I'm Done Submitting Files
	The Done Submitting Files

If multiple files are submitted and at least one has been previously submitted, the user will receive a message specifying the duplicate file(s) not uploaded to the Health Plan.



If the file(s) is password protected, the user will receive a message indicating the file(s) will not be uploaded until the file(s) is decrypted and re-submitted.

Password protected PDFs are not allowed. Please decrypt your file and resubmit. No files have been uploaded.

Virtual Mailbox Files Page

To track submissions through the Virtual Mailbox from the past 3 years, first select "Virtual Mailbox" from the Navigation Ribbon to go to the <u>Virtual Mailbox</u> page.

	1				Logout
	SMARTDA	TASTRE	AM		
Home	Utilization Management Submission	Virtual Mailbox	Account Management	Help	

Then, select "Older Virtual Mailbox Submissions".

Virtual Mailbox	
View and manage your Virtual Mailbox documents from the past 90 days. View older	Virtual Mailbox submissions using the button(s) below.
New Virtual Mailbox Submission	Older Virtual Mailbox Submissions

This will redirect the user to the "Virtual Mailbox Files" page:

Virtual N This page allows you to view f	/lai	Ibox Files vere uploaded via our Virtual Mailbox f	rom the past 3 years. You can	submit new Virtual Mailbox files	using the button below						
		New Virtual Mailbox				Back to	Virtual Mailbo	 Submissions 			
File Search		Show 10 • entries	Received Date	▼ Status	🔶 Туре	Transaction Count	Awaiting Transmission	Awaiting Response	Accepted	Rejected	Actions
SEARCH		Rocky.jpg	2020/05/07 07:51 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
Filter		TC93.pdf	2020/05/07 06:50 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
Status	~	TC94.pdf	2020/05/07 06:50 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
Date	~	TC92.pdf	2020/05/07 06:49 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
Clear Filters		TC91.pdf	2020/05/07 06:49 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
		TC32 APC1.pdf	2020/05/04 06:41 AM	Documents Accepted	Virtual Post	1	0	0	1	0	
		TC60.pdf	2020/04/23 01:25 PM	Documents Accepted	Virtual Post	1	0	0	1	0	=

The page contains the following:

- New Virtual Mailbox this link will navigate to the online submission screen. See <u>Submitting Documents</u> for additional information.
- Back to Virtual Mailbox Submissions this link is used to navigate to the <u>Virtual</u> <u>Mailbox</u> page.
- Displays batch level details for submissions uploaded to the Virtual Mailbox within the past 3 years. See <u>Submission Tracking Aged Files</u> for additional information.

Submission Tracking – Aged Files

This section will display information for submissions within the past 3 years.

Batch Name Received Date Status Transaction Awaiting Awaiting Awaiting Awaiting Awaiting Received Date Status

You can click on rext to most of the column headings to sort the results in ascending or descending order based on the column criteria.

- Batch Name file name submitted through the Virtual Mailbox
- Received Date date and time (Eastern/EST) of submission
- Status status of the file uploaded through the Virtual Mailbox
 - Submitted: Document has been submitted by provider, but not yet accepted for processing by Health Plan
 - Documents Accepted: Document has been accepted for processing by Health Plan
 - Rejected: Document is unable to be processed due to issues with upload and has been rejected by Health Plan
- **Type** Virtual Post indicates the file was submitted through the Virtual Mailbox
- Transaction Count number of transactions submitted
- Awaiting Transmission number of transmissions awaiting transmission through the Virtual Mailbox
- Awaiting Response number of files waiting to be received by the Health Plan
- Accepted number of files accepted for processing by the Health Plan
- **Rejected** number of files rejected by the Health Plan
- Action this column will display , which links to the <u>Virtual Mailbox</u> page where additional actions are available

Filtering Results

The Search box on the left side will allow users to filter results by the following criteria:

SEARCH	
Filter	
Status	~
Date	~
Clear Filt	ters

- Keyword filters results based on the Batch Name
- Status filters based on the Status of the document (Rejected, Accepted, Submitted)
- Date filters results based on the date the file was submitted